6/2/87 C0200-1

Consumer markets abroad

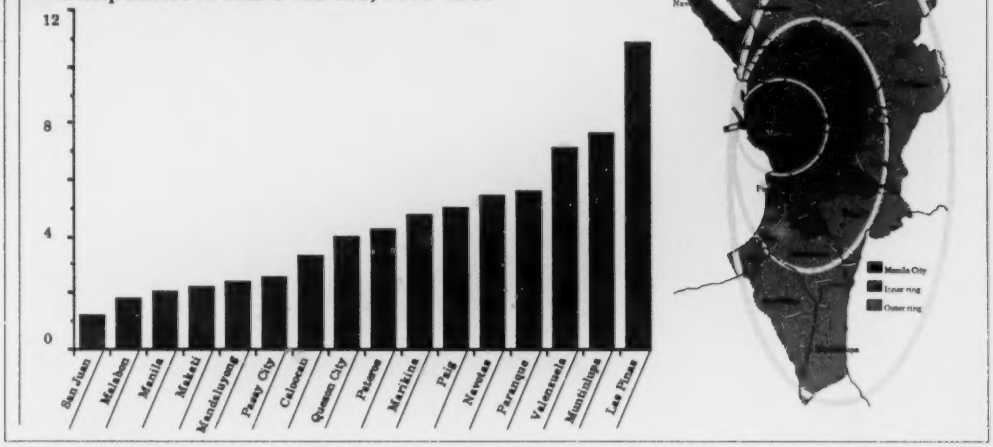
IN DEPTH/MANILA P. 1 RANKINGS P. 9 INSIDE INFORMATION P. 10 WHAT THE NUMBERS MEAN P. 11 SPECIAL REPORT ON CANADA P. 12 REGIONS P. 14 PUBLICATIONS P. 16

in depth

METRO MANILA: THE URBAN CHALLENGE

RINGS OF GROWTH: METRO MANILA CITIES AND MUNICIPALITIES OUTGROW CITY PROPER

Average annual growth rates of cities and municipalities in Metro Manila, 1975-1980



Metro Manila adds about 1 million people to its population every five years.

The Aquino government faces many challenges. Communist insurgency, quarreling ministers, and a faltering economy have all made headlines of late. But perhaps its most stubborn long-term challenge is to deal effectively with surging population growth in the Philippines. The newly ratified constitution dropped all provisions for state-sponsored population control, endorsing instead a people-as-a-resource-rather-than-a-burden attitude.

Metro Manila is the place where this challenge will first take place. Experts estimate that the Metro Manila economy must generate at least 450,000 new jobs a year just to accommodate new entrants. Providing such services as transport, water and sanitation, shelter, and communications for Metro Manila residents will continually hard press the already taxed skills, funds, and institutional capacities of the metropolitan government and its residents.

With only moderate economic growth forecast for the rest of the 1980s and continued low prices for such main Philippine exports as sugar, oil, and metal ores, the Metro economy will most likely only get to play catch-up ball at best in generating new jobs and urban services.

FORMERLY INTERNATIONAL DEMOGRAPHICS
VOLUME 6 NUMBER 6 JUNE 1987

Metro Manila's population is primarily young, with 35 percent of its total population under age 15.

METRO MANILA DOMINATES THE NATION

Metro Manila is the commercial, industrial, financial, cultural, and administrative center of the Philippines, and the world's 23rd largest urban agglomeration. Accounting for about 40 percent of the GNP of the Philippines, Metro Manila is home to 90 of the country's 100 largest business corporations and 60 percent of all manufacturing firms. Because of high in-migration—Metro Manila draws more interregional migrants than any other area in the Philippines—and a healthy rate of natural increase, Metro Manila will be the world's 16th largest urban agglomeration by the year 2000, according to the United Nations.

Metro Manila accounts for about 12 percent of the Filipino population, now housing about 6.9 million people, according to government estimates. Experts predict that Metro Manila will continue to experience the surging population growth rate it recorded between 1980 and 1985 of about 3.4 percent annually and then decline to about 2 percent annually by the year 2000. Government estimates place the population in the year 2000 at between 9.5 and 10.1 million.

Metro Manila's population is primarily young, with 35 percent of its total population under age 15. Sixty-three percent of the population are between the ages of 15 and 64, with only 2 percent over age 65. Because of continued high fertility since the late 1950s—women commonly bear six children in their lifetimes—and the youth of most in-migrants, the population will remain young

OUTER-RING MUNICIPALITIES OUTGROW MANILA PROPER

Population and average annual rate of growth of cities and municipalities in Metro Manila, 1975-1980, and density, 1980

Jurisdiction	*Population (thousands)*		*Average annual rate of growth*	*Density (per hectare)*
	1975	*1980*	*1975–80*	*1980*
Metro Manila	4,970	5,926	3.6	93
Manila	1,479	1,630	2.0	425
Caloocan	397	468	3.3	84
Pasay City	255	288	2.5	206
Quezon City	957	1,166	4.0	70
Las Piñas	82	137	10.8	32
Makati	334	373	2.2	124
Malabon	175	191	1.8	81
Mandaluyong	182	205	2.4	81
Marikina	168	212	4.7	54
Muntinlupa	95	137	7.6	29
Navotas	97	126	5.4	485
Parañaque	159	209	5.6	54
Pasig	210	269	5.0	207
Pateros	33	40	4.2	40
San Juan	122	130	1.2	125
Taguig	74	134	12.7	40
Valenzuela	151	212	7.1	45

Source: Metro Manila Commission, Office of the Commissioner for Planning, Technical Paper 3, Development Trends (Manila, 1985).

Consumer markets abroad

Publisher
Doris Walsh

Associate Publisher
Carol Terrizzi

Editor
Denise Rusoff

Research Assistant
Janet McLaferty

Production Assistant
Amy Christian

Consumer Markets Abroad, formerly International Demographics, (ISSN 0731-5414) is published monthly by American Demographics, Inc. P.O. Box 68 Ithaca, New York 14851. Telephone (607) 273-6343. Copyright 1987 by American Demographics, Inc. All rights reserved. Subscription rates are $189 a year/$269 for two years. Multiple subscriptions of three or more billed to the same address are $99 a year.

throughout this century. This will add relentless pressure to an already strained urban job and housing market as increasing numbers of youths enter their family-formation years. Rising numbers of school-age youth will also present a serious challenge to Metro Manila's school system. The 1980 school-age population of about 1.8 million students is expected to rise to about 3 million students by the year 2000.

Although poverty is widespread in Metro Manila, with about 60 percent of households officially below the poverty line of a paltry $120 a month for a family of six, Metro Manila still offers most interregional in-migrants a better life. Metro Manila's crude birth rate of 5.7 per 1,000 in 1980 is well below the national level of 8.7 per 1,000 even though nine out of the ten leading causes of death are preventable diseases. And Metro Manila has a high literacy rate of over 95 percent.

Many of Metro Manila's in-migrants settle in the provinces surrounding the Metro Manila area or in the outer-lying municipalities of the Metro Area. Between 1975 and 1980, 378,878 migrants—one-third of all interregional migrants in the Philippines—came to Metro Manila, with 204,778 leaving, mostly to resettle at the fringes of the Metro Area in the outlying provinces.

METRO MANILA GROWTH HEADS TO OUTLYING PROVINCES

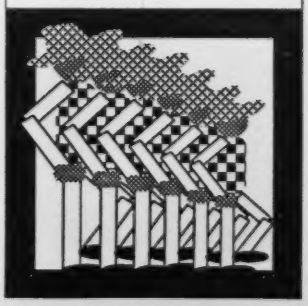
Metropolitan Manila officially includes the four cities of Manila, Quezon, Caloocan, and Pasay, and the thirteen municipalities of Makati, Navotas, Malabon, San Juan, Mandaluyong, Valenzuela, Marikina, Pasig, Muntinlupa, Parañaque, Las Piñas, Taguig, and Pateros. More than 60 percent of the population live in the densely populated inner ring area, made up of the four cities and first five municipalities of the preceding list (see map on page 1).

These municipalities and cities absorbed much of Metro Manila's in-migration during the 1960s. However, during the late 1970s and early 1980s, growth in these municipalities slowed, with the municipalities of the outer ring of Metro Manila taking up much of the slack (see table on page 2). Taguig nearly doubled in size between 1975 and 1980, growing at an average annual rate of 12.7 percent. Other fast growers between 1975 and 1980 included Parañaque (5.6 percent annually), Las Piñas (10.8 percent annually), Muntinlupa (7.6 percent annually), and Valenzuela (7.1 percent annually). Manila City's share of the total population of Metro Manila decreased from 46 percent in 1960 to 28 percent in 1980.

Most recently, the adjacent provinces of Metro Manila are increasingly becoming the destinations of Metro Manila's in-migrants and people moving out of the city's inner and outer rings. The 25 municipalities of these provinces grew at a combined rate of 6.3 percent annually between 1975 and 1980 due to cheaper land prices and government programs to resettle squatters (see table on page 5). Experts estimate that the combined population of Metro Manila and the 25 municipalities of the outlying provinces was about 8.6 million in 1985.

Bulacan Province's Marilao grew at about 11 percent annually between 1975 and 1980, while San José del Monte grew at about 9 percent annually during the same period. Rizal Province's Antipolo grew at a hefty 11.4 percent annually; Cainta, 9.8 percent annually; and Angono, 8.6 percent annually. Cavite Province's Dasmarinas

Poverty is widespread in Metro Manila, with about 60 percent of households officially below the poverty line of a paltry $120 a month for a family of six.



grew at an astounding 17.9 percent, while Bacoor grew at 7.8 percent annually.

The older, central areas of the city have maintained a steady pace of population growth—about 2 percent annually over the last 20 years. This contrasts to the usual pattern of other large world cities in which the central business districts grow slowly or not at all.

Manila has retained much of its residential character due to the designation of Quezon City as the national capital in 1947. Many government offices and commercial establishments then relocated in the new capital—which grew at 11 percent annually between 1948 and 1960—and eventually to other areas. In the 1960s, the municipality of Makati gradually took over many of the commercial functions of the central core of Manila. Makati is now Metro Manila's primary home of major corporations, international banks, financial institutions, and hotel, shopping, and entertainment complexes. This municipality grew rapidly in the 1960s at an average annual rate of 8.7 percent, then slowed to 2.5 percent annually in the 1970s.

Private-sector expansion in the north, south, and east of the capital region has been fueled by highway development, while population-driven expansion has taken

The two major growth corridors—San Fernando/Angeles and Laguna/Batangas—lie along the major north/south highways.

place in the northwest. The two major growth corridors—San Fernando/Angeles and Laguna/Batangas—lie along the major north/south highways. Since the mid 1970s, industrial expansion has spread northward to the Balintawak area and along the Quirino and MacArthur Highways. Industrial expansion along the South Super Highway and the Pamplona Road is less concentrated.

WHERE THE HAVE AND HAVE-NOTS LIVE

Manila shows a marked pattern of residential segregation by income. The poor are concentrated in Manila's central business district, spreading from there northwards to the city of Caloocan. The high-density municipality of Navotas contains the low-income community of Tondo. The better-off live to the south and south east—in Makati, the districts of Greenhills, San Juan, and Parañaque—and to the northeast in the district of Santa Mesa, the Quadrangle in Quezon City, in New Manila, and in the Marikina Valley.

STRONG ECONOMIC BASE HARD HIT BY DOWNTURN

Although Metro Manila has a strong economic base and higher than average levels of income, it has been particularly hard hit by

Manila shows a marked pattern of residential segregation by income.

METRO MANILA'S ADJACENT PROVINCES ABSORB NEW GROWTH

Population and average annual rate of growth of municipalities in Metro Manila's adjacent areas, 1975-1980, and density, 1980

Province	*Municipality*	*Population (thousands)*		*Average annual rate of growth 1975–80*	*Density (per hectare) 1980*
		1975	*1980*		
Bulacan	Obando	32,378	39,618	4.1	8
	Meycauayan	60,225	83,579	6.8	39
	Marilao	21,017	35,069	10.8	10
	San José del Monte	59,021	90,732	9.0	4
	Bocaue	40,577	49,693	4.1	15
	Bulacan	28,361	34,920	4.3	5
Rizal	Montalban	31,176	41,859	6.1	1
	San Mateo	38,955	51,910	5.9	8
	Antipolo	40,944	68,912	11.0	2
	Cainta	36,971	59,025	9.8	58
	Taytay	58,274	75,328	5.3	19
	Cardona	21,266	24,503	2.9	8
	Angono	17,574	26,571	8.6	10
	Binangonan	63,215	80,980	5.1	11
Laguna	Biñan	67,444	83,684	4.4	19
	San Pedro	43,439	74,556	11.4	33
	Sta. Rosa	47,639	64,325	6.2	17
Cavite	Carmona	51,004	65,014	5.0	16
	Imus	48,566	59,103	4.0	7
	Bacoor	62,225	90,364	7.8	36
	Noveleta	12,141	14,460	3.6	26
	Cavite City	82,456	87,666	1.2	74
	Dasmariñas	22,805	51,894	17.9	6
	Kawit	33,813	39,368	3.1	29
	Rosario	28,725	33,312	3.0	93

Source: Metro Manila Commission, Office of the Commissioner for Planning, Technical Paper 3, Development Trends (Manila, 1985).

trendwatch Manila

More of the family budget goes toward housing.

Household size is decreasing.

Real family income is on the decline.

New households are forming rapidly as large numbers of youth enter their family-formation years.

Most new housing is illegal and substandard.

the recent downturn in the national economy. Metro Manila is estimated to have absorbed about two thirds of the 44,000 layoffs in manufacturing nationwide in 1984.

The labor force participation rate has averaged around 54 percent annually in recent years. In 1984, 16.3 percent of the labor force were unemployed, with 43 percent of the labor force considered underemployed. The inability of a substantial proportion of the population to make a living wage has resulted in all the characteristics of urban poverty—makeshift housing, slum conditions, and inadequate health care.

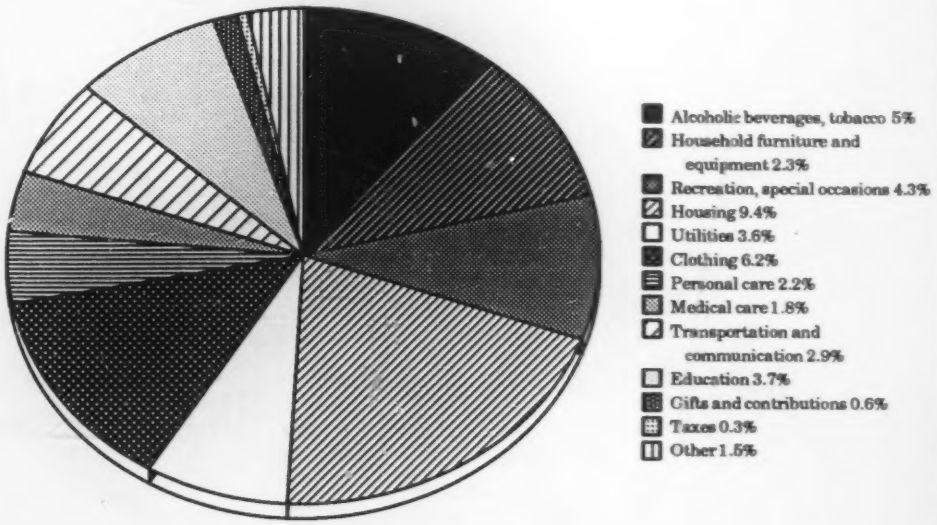
Chronic underemployment and worsening unemployment are ongoing problems for Metro Manila. Between 1985 and the year 2000, Metro Manila will have to generate an estimated 450,000 new jobs a year just to accommodate its rapidly expanding labor force.

Metro Manila employed about 45 percent of the nation's nonagricultural labor force in 1983, or about 2 million people. About 40 percent worked in industry, while 60 percent worked in services. In 1984, professional, technical, and related workers made up 12 percent of the labor force; administrative, executive, and managerial workers, 2.5 percent; clerical and related workers, 11 percent; sales workers, 13 percent; service workers, 20 percent; agricultural, animal husbandry and forestry workers, fishermen and hunters, 2 percent; production and related workers, 36 percent; and unclassified workers, 5 percent (total may not add to 100 percent due to rounding).

Industrial employment dominates in Taguig, accounting for 53 percent of all employment; Valenzuela, 51 percent; Muntinlupa, 50 percent; and Pateros, 50 percent. Quezon City accounts for the largest share of professional, technical, and related workers (16 percent), but generally service-sector workers are evenly distributed throughout the cities and munici-

WHAT THEY BOUGHT

Percentage distribution of total family expenditures by major expenditure group: 1971



Source: 1985 Family Income and Expenditures Survey, Philippines National Census and Statistics Office.

palities.

As in most cities of the developing world, manufacturing employment is giving way to service-sector employment. Between 1977 and 1983, the proportion of workers in industry declined from 43 to 38 percent of all Metro Manila workers. During the same period, service employment rose from 55 to 60 percent of the total.

However, the informal sector accounts for a large proportion of employment in the Metro Area. About 826,000 workers, or 37.5 percent of the labor force, were employed in the informal sector between 1977 and 1983.

FAMILY INCOME DECREASES BETWEEN 1971 AND 1985

Although average annual family income increased from 3,736 pesos to 30,748 pesos between 1971 and 1985, average family income in real terms decreased 265 pesos—from 3,736 pesos in 1971 to 3,471 pesos in 1985. The estimated total income of the 9.5 million Filipino families in 1985 was 294 billion pesos, representing a twelve-fold increase over the 24 billion pesos reported by the 6.3 million families in 1971.

Total expenditures of Filipino households in 1985 were 256 billion pesos. Median family income in 1985 was 19,993 pesos. Families living in Metro Manila and Central Luzon were the only Filipino families to beat out the national averages for family income land expenditure.

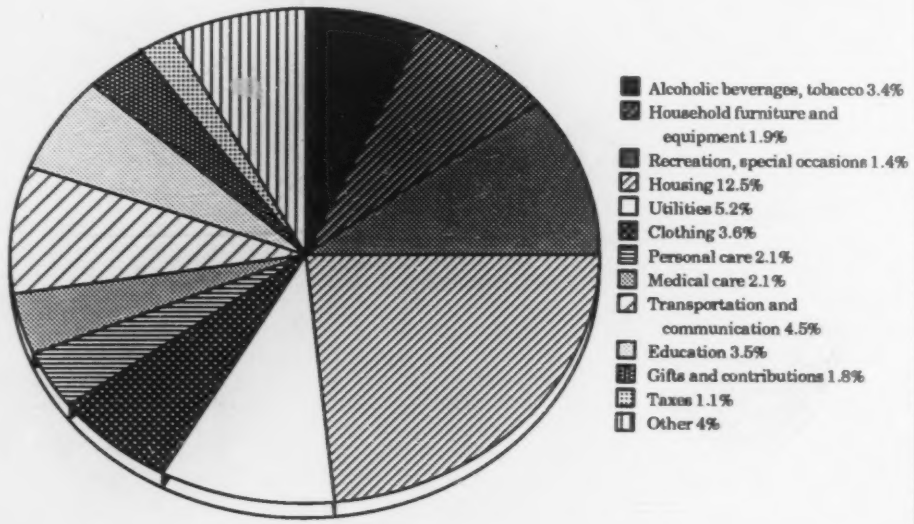
Households in 1985 were primarily dependent on entrepreneurial activities (41 percent) and wages and salaries (40 percent) for their main source of income. Most entrepreneurial families—55 percent—were engaged in crop farming and gardening. Eighteen percent were engaged in wholesaling and retailing.

About 6 percent of all Filipino families reported receiving assistance from Filipinos who work overseas. Over half a million Filipinos now work in 114 countries.

As in most cities of the developing world, manufacturing employment in Metro Manila is giving way to service-sector employment.

WHAT THEY BUY NOW

Percentage distribution of total family expenditures by major expenditure group: 1985



Source: 1985 Family Income and Expenditures Survey, Philippines National Census and Statistics Office

Expenditures on food still dominate the Filipino household budget, although they show a downward trend.

Expenditures on food still dominate the Filipino household budget, although they show a downward trend. In 1985 food expenditures accounted for 51.2 percent of household spending, down from 53.8 percent in 1961. Eating out gobbled up more of the Filipino family budget in 1985, accounting for 3.1 percent of food expenditures, up from 2.3 percent in 1961 and 2.7 percent in 1971. Cereal consumption was down over the same period with a corresponding rise in meat, dairy product, and egg consumption. Cereal consumption decreased from 20.2 percent of the total food budget in 1961 to 18.1 percent in 1985, while meat, dairy product, and egg consumption rose from 7.9 percent to 10.2 percent over the same period.

Over the past two decades, expenditures on housing took an increasing share of the family budget. In 1985, housing expenditures accounted for 12.5 percent of total household spending, up from 8.3 percent in 1961. Urban residents spent proportionally more than their rural counterparts for housing in 1985, with urban families spending about 16 percent of the family budget on housing, as compared to the 8.5 percent that rural families spent.

Transportation and communication expenditures also took an increasing share of the household budget, rising from 2.3 percent to 4.5 percent of total spending.

Spending on clothing, footwear, and other wear decreased over the last two decades, down from 7 percent of the family budget in 1961 to 3.6 percent of the budget in 1985. Spending on recreation also decreased, from 1.8 percent of the

INCOME INEQUALITY PLAGUES PHILIPPINES

Total number of families, total and average family income by income class, 1985

Income class	*Total number of families (in thousands)*	*Total income (in thousand pesos)*	*Average income (in pesos)*
Total	9,566	294,142,802	30,748
Under 2,000	15	23,728	1,549
2,000 and over	9,551	294,119,075	30,795
2,000-3,999	109	347,903	3,191
4,000-5,999	286	1,475,722	5,156
6,000-7,999	467	3,302,703	7,069
8,000-9,999	658	5,955,884	9,048
10,0000 and over	8,031	283,036,863	35,243
10,000-14,999	1,761	22,016,000	12,502
15,000-19,999	1,488	25,896,460	17,405
20,000 and over	4,782	235,124,403	49,169
20,000-29,999	1,843	45,104,353	24,470
30,000-39,999	1,036	35,726,158	34,482
40,000-59,999	983	47,590,409	48,413
60,000-99,999	593	44,617,626	75,241
100,000-249,999	284	40,634,304	143,319
250,000-499,999	34	11,217,160	332,488
500,000 and over	9	10,234,393	1,164,587
Median income (pesos)	—	19,993	—

Source: 1985 Family Income and Expenditures Survey, Philippines, National Census and Statistics Office.

household budget in 1961 to 0.5 percent in 1985.

HOUSEHOLD SIZE DECREASING

The dire need for adequate housing in Metro Manila cannot be overstated. At present, 60 percent of all new housing is illegal and substandard. Formal-sector housing is simply beyond the reach of most of Metro Manila's new families. And although government spending on housing rose from 260 million to 1.1 billion pesos between 1978 and 1983, public investment could not keep up with the pressing demands of new family formation and in-migration. Metro Manila's housing problems are likely to become more severe as future increases in public funding are not expected due to economic hard times and private residential construction will continue to service only the well-developed market.

Metro Manila has an inadequate sewerage and water supply system. At present, only 3.5 million of the nearly 7.5 million residents of Metro Manila get their water directly from the public water supply. Another 1.8 million get it indirectly from neighbors or vendors and privately owned pumps and wells. The World Bank in conjunction with the Metropolitan Waterworks and Sewerage System is currently funding extensive water supply development programs.

In 1980, Metro Manila had about 1.1 million dwellings, of which 66 percent were single units and nearly half of which were single rooms less than 30 square meters in area. A majority were occupied by renters.

Households in Metro Manila are decreasing in size. Average household size in 1980 was 5.4, down from 6 persons per household in 1975. This trend is expected to continue with average household size down to 4.4 persons per household in 1990.

SOURCES

The most up-to-date analysis of the demographics of Metro Manila is **Population Growth and Policies in Mega-Cities: Metro Manila,** published by the United Nations in 1986. One in a series of mega-city analyses prepared by the Population Division of the Department of International Economic and Social Affairs of the United Nations Secretariat, this publication examines in detail demographic trends, background information on the city's economic base, the spatial structure of the metropolitan region, and the sectoral and spatial distribution of jobs. Other topics include housing, urban land, the job market, transport, and the environment including air quality, the water supply, and sewerage treatment. Much attention is also given to current development schemes and future plans for managing urban growth.

For original sources, the best place to start is with the Metro Manila Commission (MMC), Office of the Commissioner for Planning. The MMC published fifteen technical papers in 1985 describing the characterisitcs of the Metro Area. Titles include *Metro Manila: Natural Opportunities and Constraints for Development; Population; Regional Economy; Employment; Income; Health; National and Regional Context; Land Use; Shelter Sector; Development Policy; Development Trends;* and *The Development of Metropolitan Manila's Administration.* The Commission on Population also publishes fact sheets on Metro Manila titled *Population Fact Sheets: National Capital Region.*

rankings

WORLD METRO AREAS—WHERE DOES MANILA FIT IN?

Fastest growing urban agglomerations in Asia between 1950 and 1980, according to the United Nations.

	Average annual growth rate 1950-1980
1. Seoul, Korea	6.8
2. Tehran, Islamic Republic of Iran	5.2
3. Jakarta, Indonesia	4.5
4. Damascus, Syrian Arab Republic	4.4
5. Manila, Philippines	**4.0**
6. Bangkok, Thailand	3.8
7. Hong Kong, Hong Kong	3.2
8. Singapore, Singapore	2.6

inside information

PHILIPPINE FAMILY INCOME DECLINES IN REAL TERMS

The real fate of household income growth lies in the performance of the Philippine economy, an economy that reflects the uncertainty of the just over one-year-old Corazon Aquino government.

Despite the overall positive performance of the Philippine economy in the last decade—GDP grew at an annual rate of 2.3 percent, jumping from $18 billion to $26.6 billion between 1976 and 1986—recent years have not been good for the average Filipino. Due to declines in world prices for Philippine sugar and copper, the high price of servicing the overseas debt, a flight of capital, and a decline in both domestic and overseas investment, GDP growth, which averaged 5.1 percent annually during the 1960s and 6 percent annually during the 1970s, began its decline to 3.2 percent in 1983 and a disastrous –5.5 percent in 1984 and –0.1 percent in 1986.

At present, 60 percent of all Filipino households are considered below poverty level—officially set at a paltry $120 a month for a family of six—or are unable to meet basic needs. Demographic pressures, a struggling economy, and political instability exacerbate this picture.

Philippine mean family income has declined 46 percent in real terms since 1981. Per capita GNP in 1986 was only $660—down from a high of $775 in 1982—with income distribution remaining uneven. In 1986, the highest 20 percent of households garnered 50 percent of total income. However, some improvement is expected as the Aquino government begins the long struggle of attempting to equalize incomes, especially through land reform.

But the real fate of household income growth lies in the performance of the Philippine economy, an economy that reflects the uncertainty of the just over one-year-old Corazon Aquino government. Experts remain tentative about how well it will do in 1987. Pessimists look at two years of contraction totaling nearly 10 percent and predict more of the same. Optimists see a 6 percent expansion in both 1987 and 1988. More moderate economists quoted in *The AsianWall Street Journal* predict a 2.7 percent growth rate in 1987.

With the ratification of the new 1986 constitution and the attendant hope for a sustained period of stability, the Aquino govenment may be able to draw in new foreign investment. But no one expects the sustained spectacular growth of the 1970s to repeat itself again in the 1980s.

Experts see relief from the country's foreign debt as the way to get the economy rolling again. The Philippines must cope with its most troublesome $26 billion overseas debt, which absorbs 40 percent of its export earnings. This debt has been frozen since 1983, with no repayments made on the principal since November of 1983. Some progress in rescheduling payments has already been made, however. Finance Minister Mr. Jaime Ongpin secured easier repayment terms for $870 million worth of debt from French bankers in January 1987.

The Philippines may have to settle for moderate growth or no growth at all for the next few years. World prices for its main exports—coconut oil, sugar, and metal ores—have fallen. Trade with the U.S. was flat in 1986. The U.S. buys 35 percent of Philippine exports and provides 25 percent of its imports. Rising gold prices are helping some mining companies, but other commodity prices are not expected to rise.

New industry is badly needed, but local investors are reluctant to diversify into new areas of business. The government wants to spend heavily to spur the economy by building roads, bridges, schools, and irrigation systems to the tune of $190 million.

Governmental intervention in family affairs in the Philippines is a thing of the past. The Philippine government has abandoned its 1973 constitutional commitment to controlling population. Aquino herself led the fight to ban family planning from the recently ratified 1986 constitution, arguing that it is a basic human right for parents to have the number of children they desire. The problem in the Philippines, according to Social Services Minister Mita Pardo de Tavera, is not overpopulation but an inequitable economic structure.

The issue at hand in the Philippines as well as in many nations in the developing world is whether people are a resource or a burden. The widely held belief that population growth slows economic development is coming under increasing scrutiny. Proponents of the wealth-in-numbers view of population growth see the economic and political system of a particular country, not population growth, as the central issue.

A study conducted by Nobel laureate economist Simon Kuznets argues that faster population growth is not associated with slower economic growth. According to Julian Simon, author of *The Economics of Population Growth* and *The Ultimate Resource,* "it is the economic level that influences the rate of population growth, not the reverse. Costs and benefits of having children change with the shift from rural to urban living along with increases in education and shifts in attitudes—this being the famous demographic transition."

Proponents of the wealth-in-numbers view of economic growth cite such countries as Thailand, Malaysia, Ecuador, Jordan, Brazil, Mexico, Syria, Panama, Taiwan, South Korea, Singapore, and Hong Kong as examples of countries which have experienced rapid population growth and rapidly rising per capita income levels.

The question for the Philippines, however, is just how fast it can spur its economy in order to provide jobs and housing for its burgeoning population. The population of the Philippines has about tripled since 1948, making it the world's 17th most populous nation and the 8th most populous nation in Asia. Family planning, which increased substantially in the 1970s, stalled in the 1980s. The 1983 National Demographic Survey found the National Population Program unable to cope with the increasing numbers of women entering their childbearing ages.

In 1975, the average number of lifetime births stood at 5.2 per woman. Fertility declined to 4.7 children per woman in 1986, but because of continued high fertility, the population will continue to grow rapidly, from 59.8 million in 1986 to 85.5 million in the year 2000 and 107 million in 2010, placing unrelenting demographic pressures on the country. Fertility should decline to about 4.1 births per woman by the year 2000.

A major source of concern is the pressure for urban jobs and housing as the disproportionately large group of Filipino youth enter their childbearing years. At present about 41 percent of the population are under 15. More important for short-term job market expansion is the 20 percent of the total Filipino population aged 15-24.

Adequately employing the growing numbers of those just entering the labor force is a major task for the struggling Filipino economy. In just 14 years, the 30 million people over age 15—of which 19 million are in the labor force—will swell to about 47 million, with an estimated labor force of almost 32 million. Providing an additional 13 million jobs in a short 14-year span when the current 19 million workers are not yet adequately employed is an unreachable goal.

what the numbers mean

POPULATION CONTROL IN THE PHILIPPINES

Proponents of *supply-side demographics* increasingly challenge the belief that population growth impedes economic progress. Are people a resource or a burden? Aquino's new constitution voted squarely on the side of those who believe in wealth in numbers.

special report

THE SENIORS BOOM IN CANADA

With the tip of the baby boom generation—those born between 1946 and 1966—entering their twilight years in the second decade of the 21st century, Canada will gray at an increasingly rapid speed.

Growth of the senior population in Canada is outpacing that of the total population. Between 1981 and 1991, those aged 65 and over will increase at an average annual rate of 3 percent, as compared to 1 percent for the entire population. About 2.7 million Canadians are now over age 64. By the year 2000, Canada's seniors will number close to 4 million people.

This trend is one that will not go away. Experts predict that the growth rate for Canadian seniors will slow to about 2 percent annually in the 1990s and the first decade of the 21st century and then accelerate rapidly as the baby boomers start to totter towards advanced age.

With the tip of the baby boom generation—those born between 1946 and 1966—entering their twilight years in the second decade of the 21st century, Canada will gray at an increasingly rapid speed. Because of the size of the baby boom, one in every five Canadians in 2021 will be aged 65 or over.

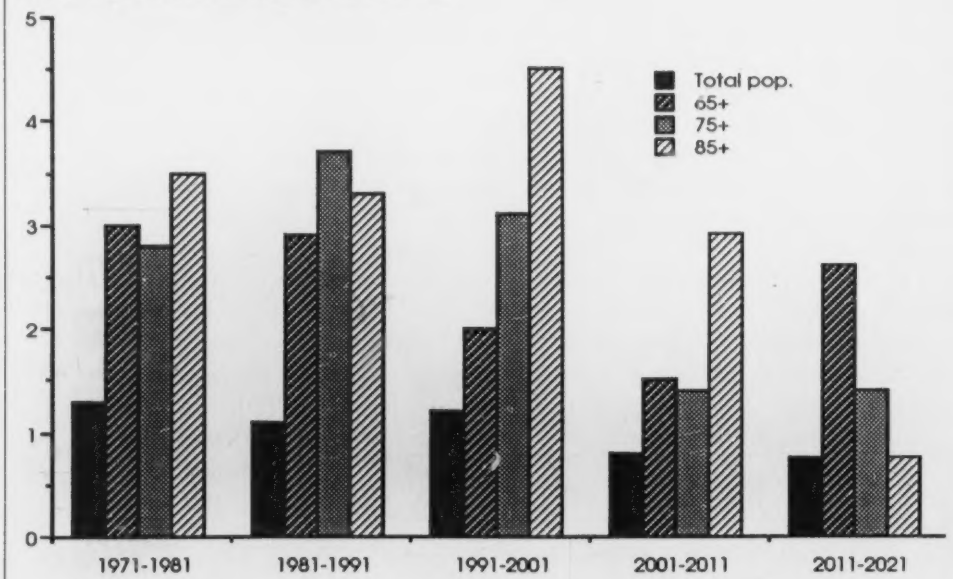
In the next 45 years, the number of Canadian oldsters will triple, reaching 7.5 million in 2031. The number of very old will also grow rapidly, and, in fact, will show the greatest growth rate in the 1980s—about 3.5 percent annually for Canadians aged 75 and over. The group of those aged 75 and over will triple in size to about 1 million by 2031. Those aged 85 and over will go from 224,000 to about 750,000. The very, very old—those aged 85 and over—will grow at the rapid rate of 4 percent annually in the 1990s.

THE MATURE MARKET

Changes lie ahead in the purchasing behavior of mature households as the more educated, more moneyed, middle-aged people enter the ranks of the elderly. Increasing

GROWTH OF CANADIAN SENIOR POPULATION OUTPACES TOTAL POPULATION

Average annual growth rates for selected age groups, Canada: 1971-81 to 2011-21



Source: Statistics Canada

incomes and rising levels of education should bring consumption patterns more into line with those of younger consumers.

Aging takes on particular significance in light of the fact that age and income are the two most important demographic characteristics in determining what a person will buy. Income trends are vital in understanding the market potential of the graying market. Factors such as whether or not persons must finance their retirement, the need for sheltered housing, health care costs, and the level of government social security and support service expenditures need to be considered when looking at these markets.

GRAYING CANADIANS GET HEALTHY

Watching the activity trends of graying Canadians can tell a lot about what kinds of leisure, health, and recreational items they will be purchasing later in life. Baby-boomer purchasing behavior and activity trends are particularly worth watching as they will make up the bulk of the elderly in the 21st century.

Graying Canadians are increasingly taking to regular exercise—more so even than their younger counterparts. Between 1976 and 1981, the proportion of able-bodied seniors exercising regularly grew from 50 percent to 60 percent, according to the Canada Fitness Survey. This increase was greater for seniors than for any other age group.

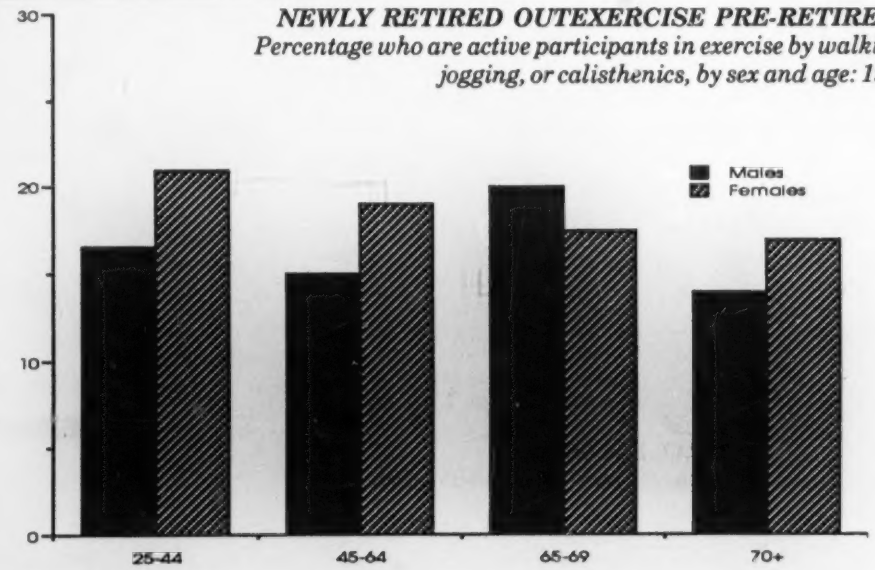
In fact, more of the newly retired—those aged 65 to 69—actively engaged in exercise than those in the pre-retirement years of 45 to 64 (see accompanying bar chart). And this included all Canadians aged 65 to 69, not only able-bodied seniors. As the chart shows, the proportion of those who exercised regularly decreased from the age group 25 to 44 to that of 45 to 64 and then increased slightly to that of 65 to 69.

Source: These and other findings about the Canadian seniors boom are presented in an innovative chart book produced by Statistics Canada. See the back page for further details about this valuable source book on graying Canadians.

Baby-boomer purchasing behavior and activity trends are particularly worth watching as baby boomers will make up the bulk of the elderly in the 21st century.

NEWLY RETIRED OUTEXERCISE PRE-RETIREES

Percentage who are active participants in exercise by walking, jogging, or calisthenics, by sex and age: 1981



Source: Statistics Canada

regions

CANADA, MALAYSIA, INDONESIA, BRAZIL, WEST GERMANY

Canada spends more on education Canada will spend $34.6 billion (in current Canadian dollars) in 1986-87, up from $15.1 billion in 1976-77. This represents a 4.7 percent increase over last year. Last year's expenditure

represented 7.3 percent of the GNP, down from an all-time high of 9 percent in 1970-71, however.

Other education trends include a leveling off of declining elementary enrollments, which began in the 1970s, and a leveling off of increasing enrollments in community colleges at 319,400 students, while full-time university enrollments were expected to continue to rise by 0.6 percent to 470,300 in 1986.

An estimated 102,300 bachelor's and first professional degrees were granted by universities in 1986 (19,000 more than in 1976), 15,500 master's degrees (3,900 more than in 1976), and about 2,070 doctorates (380 more than in 1976).

For more on education in Canada, order *Advance Statistics of Education 1986-87* ($15 Canadian) by contacting Edith Rechnitzer at (613) 990-9167.

Part-time employment takes off in Canada Since 1981, the number of part-time employees in Canada who want to work full-time has grown significantly. These "involuntary" part-time workers topped half a million in 1985, compared to 109,000 in 1975.

Most involuntary part-time workers are women aged 25 to 54 and youth aged 15 to 24. About 7 of every 1000 community, business, and personal service workers are involuntary part-timers, as compared to only one in every 100 manufacturing workers.

For more information, contact the Labor and Household Surveys Analysis Division of Statistics Canada at (613) 991-4624.

Malaysian household income increases Average monthly household income in Malaysia was M$723 in 1984, up from M$166 in 1970, according to the *1985 Yearbook of Statistics* published by the Malaysian Department of Statistics. Average monthly income grew by 11.1 percent annually during this period.

Urban-income growth outpaced rural-income growth, however. Between 1970 and 1984, average monthly income in urban areas increased from M$265 to M$1,027, while rural-area income increased from M$139 to M$596 over the same period.

At constant 1970 prices, the gain was smaller, however. Average monthly household income increased 4.6 percent annually, from M$166 to M$326 between 1970 and 1984.

Jakarta cuts back transmigration program Budgetary problems are scaling down Indonesia's controversial transmigration program—a program that moves

volunteers from overcrowded Java to sparsely settled Irian Jaya. Controversy stems from charges that transmigration destroys the traditional Melanesian tribal culture, destroys rain forest, and creates a Javanese buffer zone with Papua New Guinea. But for dirt-poor Javanese farmers it is a way out of intense poverty and hopelessness.

The 1987-88 Indonesian budget, which slashes program funding by 66 percent, leaves the World Bank as a major contributor of funds for the transmigration program. The World Bank will fund about 45 percent of the program. Last year's budget also cut the program—by 44 percent.

Because of these cuts, the program will fall short of moving the 750,000 projected transmigrant families, a total of about 3.4 million people. New estimates call for moving 1,000 new families in 1987-88, lowering the actual count of transmigrant families to about 600,000.

So far—halfway into the five-year 1984-89 plan—22,000 families (about 100,000 people) have been moved.

Source: The Asian Wall Street Journal, March 9, 1987

Brazilians having fewer babies Results of the 1986 National Survey of Maternal/Child Health and Family Planning turned up a surprise for pronatalist Brazil—for all Brazilian women aged 15 to 44, the total fertility rate fell about 1 child per family to 3.1 lifetime births. And all this without any government intervention in family planning.

These findings confirm the pronatalist view that women tend to have fewer children as their socio-economic circumstances improve. Brazil has long believed, as the Malaysians do, that people are a resource, not a burden.

The survey also found that 65 percent of currently married women or those in consensual unions used contraceptives. Contraceptive use was higher for urban than rural women and among more educated women.

The population will continue to grow however due to a falling deathrate. Brazil now has about 140 million people.

Source: Population Today, March 1987

SOUTH AMERICA

EUROPE

Germans see talks with friends and being outdoors best ways to reduce stress Move over jogging and running, old values are back. In a poll commissioned by an American advertising firm, reading and sports were way down the list in the ways Germans fight stress. Talks with friends and family topped the list, with being outdoors the second most popular technique of combatting stress.

Stress was up, however, with 34 percent of respondents feeling more stress in their lives, 41 percent feeling just as much, and 23 percent feeling less stress than five years ago.

Consumer Markets Abroad *is* user friendly

Question: *Can you sell American-made fashions in Japan?*

To answer that--or even to make an intelligent guess--you need to have answers to questions about key Japanese demographics, and spending patterns. How many single-person households are there in Japan? How old are singles? What do young Japanese spend money on?

At *Consumer Markets Abroad* (formerly *International Demographics)* we bring you the facts you need to reach foreign customers every month. Because *Consumer Markets Abroad* has access to Census Bureau data, we can now offer our readers additional global consumer information. To get answers to *your* international consumer marketing questions call (607) 273-6343 during business hours and ask for Janet, Denise, Carol, or Doris. Find out why we're "user friendly."

publications

NEW FROM CANADA

The Seniors Boom: Dramatic Increases in Longevity and Prospects for Better Health, by Leroy O. Stone and Susan Fletcher, Statistics Canada, Ottawa, Canada, 48 pp., $US 10.95. Order from Publications Sales at (613) 993-7276 or write Publication Sales, Statistics Canada, Ottawa, K1A OT6.

Not only are Canadian seniors living longer, but they are improving their health practices. Thus, Canadian seniors should not only live longer but enjoy a more active life as well.

These and other aspects of growing old in Canada are reported on in *The Seniors Boom,* Statistics Canada's new book on aging. It charts the latest projections of what will happen as the baby boomers pass through their senior years, as well as exploring aspects of lifestyles that appear to promote better health among the elderly.

The chartbook format of this publication makes for easy understanding of aging trends, presenting data graphically with an accompanying textual analysis. A great volume of heterogeneous detail is presented attractively and as clearly as feasible without distorting facts.

If you're interested in Canada, don't miss this most informative and readily-understandable demographic analysis of graying Canada.

Another title offered by Statistics Canada is:

Women's Work Interruptions: Results from the 1984 Family History Survey by Patricia Robinson.

For further information, contact the Housing, Family and Social Statistics Division of Statistics Canada at (613) 991-2542.

Consumer markets abroad
Box 68, Ithaca, New York 14851

FIRST CLASS
U.S. POSTAGE
PAID
ITHACA, N.Y.
PERMIT NO. 780

OGARNRSCNGR14ZA 12/31/99
SUSAN GARNER, STE800
CONGRESSIONAL INFO
4520 EAST WEST HWY
BETHESDA, MD 20814